



## Chief Information Officer's IT Portfolio Review

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Office of Chief Financial Officer

July 10, 2018



# Agenda

- Opening Comments
- FY 18-19 Drivers That Will Affect IT Needs/Services
- Status of Action Items from Previous IT Portfolio Review
- Upcoming IT Acquisitions
- Organizational Chart by IT application
- System Interfaces
- IT Portfolio Governance
- Investments
- OEI Services
  - New Shared IT/IM Contracts, Licenses, and Services
  - eDiscovery and Records and Content Management
  - Continuous Diagnostics and Mitigation
  - Ideas on Shared Services and Software
  - Other Feedback for OEI
- Application Deployment
- OCFO's Applications



## FY18-19 Drivers That Will Affect IT Needs/Services

Drivers	IT Impact
Pathway to Shared Services	Payment Processing Modernization Projects: eInvoicing; GPAS Consolidation; IAs into Compass; Small Payments to Compass; PRs into Compass
G-Invoicing	Grants Financial transactions into Compass
NewPay	PeoplePlus Integration, PCA Integration



# FY18-19 Drivers That Will Affect IT Needs/Services

## Key IT Strategies and Initiatives for FY18-19

- Are there any IT roadblocks you are facing?
  - Cross Organizational support required for proper implementations
- Is there any IT assistance you need for science or modeling?
  - Not at this time



## Status of Action Items from Previous IT Portfolio Review

Number	Action Item from previous review	Status
2.01	David Devere and Tim Thorpe shall discuss moving Compass' disaster recovery (DR) to NCC.	
2.02	Michael Hillard and Quentin Jones shall meet to discuss OCFO's system architecture and projects, including SCORPIOS.	
2.03	OCFO shall provide a copy of its IT Strategic Plan to <a href="mailto:FITARA-Review@epa.gov">FITARA-Review@epa.gov</a>	
2.04	OCFO shall comply with the requirements of Steven Fine's "Data Call for Registry of EPA Applications, Models and Databases" email of June 23, 2016.	
2.05	OCFO shall consolidate the OCFO Las Vegas La Plaza computer room with EPA's other Las Vegas data centers, or with the data center in Denver.	
2.06	Rob McKinney's team shall meet with Quentin Jones to provide an update on the Continuous Diagnostics and Mitigation (CDM) project.	
2.07	Brian Epley shall contact Michael Roberts to discuss configuration of Windows 10 to work with Concur.	This was resolved.
2.08	The CIO-SAC shall discuss financial data governance and financial systems architecture.	
2.09	OEI shall schedule a joint portfolio review of OARM and OCFO.	Deferred



## Upcoming IT Acquisitions

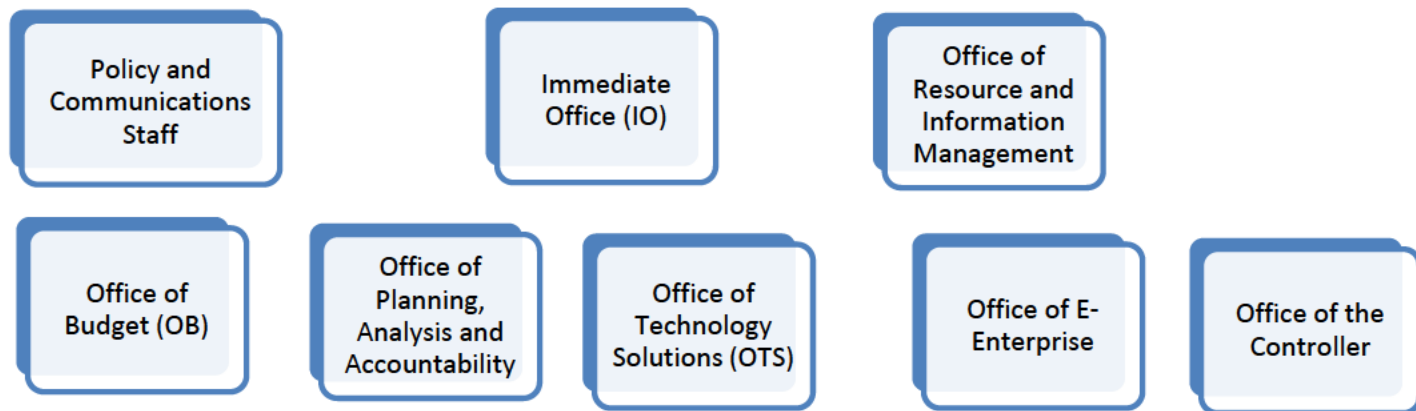
Sub-Office	Contract Description	Target award date	Greater than \$1M/Year?	Comments
OB	Budget Formulation System (BFS) Cross-Agency Service Contract	First Quarter FY19	Yes	The contract bid was approved last year, but was delayed. Will be moving forward with competition. Acquisition would replace the current BFS bridge contract.



# Organization Chart

*OEI populated application names based on organizational data in READ*

- Small/Others:**
- CGE
  - Compass
  - mLINQs
  - PPL
  - OCFO GSS
- Medium:**
- BFS
  - E-E Portal
- Lite:**
- OCFO-PTS



**Medium:**

- BAS
- BFS

**Major:**

- Fnirs (Compass/PPL)

**Lite:**

- SCORPIOS
- OCFO-PTS

**Small/Others:**

- ERC
- OCFO GSS(GLADR/FMFIA)
- Mlinqs

**Lite:**

- E-E Portal







*From ITPR Round 1*

## OCFO System Interface Diagram



**Name of Governance Board:** OCFO Change Control Board

**Composition:** SIO, OCFO Office Directors, and OARM Rep.

**Frequency Of Meeting:** Monthly

Investment Documentation	Investment Management Practices	Portfolio Management Practices
<ul style="list-style-type: none"> <li><input type="checkbox"/> Complete list of investments</li> <li><input type="checkbox"/> Annual budget per investment</li> <li><input type="checkbox"/> Cost/schedule data per investment</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Control cost/schedule</li> <li><input type="checkbox"/> Set technology strategy (e.g., open source platform, cloud)</li> <li><input type="checkbox"/> Direct Agile development</li> <li><input type="checkbox"/> Align to strategic objectives</li> <li><input type="checkbox"/> Reduce lifecycle costs</li> <li><input type="checkbox"/> Monitor/improve investment performance</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Set portfolio-level performance objectives</li> <li><input type="checkbox"/> Set portfolio-level technology objectives</li> <li><input type="checkbox"/> Add/delete items from portfolio</li> <li><input type="checkbox"/> Align portfolio objectives with other program portfolios</li> </ul>

**Greatest Governance Enablers:**

**Greatest Governance Challenges:**

[illegible]



[illegible]



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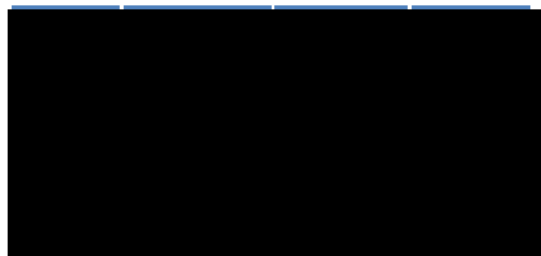
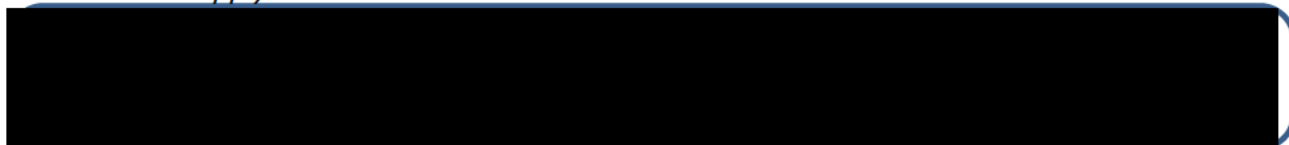
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# Superfund Cost Recovery Package Imaging and Online System - SCORPIOS

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- New Shared IT/IM Contracts, Licenses, and Services
- Updates on specific services
  - eDiscovery and Records and Content Management
  - Continuous Diagnostics and Mitigation (CDM)
- Ideas on Shared Services
- Other Feedback for OEI



# New Shared IT/IM Contracts, Licenses, and Services

Name	Summary	Date Available	Website / Email
Agile Coaching and Training Service	Agile coaching and training contract support vehicle available to the agency to foster the adoption of agile practices and to support continuous improvement and delivery of digital services.	FY18 Q3	<ul style="list-style-type: none"> <li>• <a href="mailto:Humrighouse.Ryan@epa.gov">Humrighouse.Ryan@epa.gov</a></li> </ul>
Business Automation Platform	Software platform, powered by Salesforce's force.com, for rapid development and deployment of both mission programmatic and administrative business operations applications, including forms and workflow.	Now	<ul style="list-style-type: none"> <li>• <a href="#">BAP Community Site</a></li> <li>• <a href="mailto:Hinds.Timothy@epa.gov">Hinds.Timothy@epa.gov</a></li> </ul>
Cloud Software Development and Management Tools	Enterprise licenses for Atlassian (JIRA, Confluence, Bitbucket), Github	Github: Now. Atlassian (JIRA, Confluence, Bitbucket): Limited Pilot FY18 Q2.	<ul style="list-style-type: none"> <li>• <a href="mailto:Ward.Dalroy@epa.gov">Ward.Dalroy@epa.gov</a></li> </ul>
Customer Experience Services	Consultative assistance in improving OEI IT/IM services and in implementing customer experience principles.	Now	<ul style="list-style-type: none"> <li>• <a href="mailto:customer.experience@epa.gov">customer.experience@epa.gov</a></li> </ul>
Innovation Fellowship	The EPA Innovation Fellowship Program recruits, qualifies, and hires cutting-edge experienced technologists into EPA as term-limited federal employees.	Now	<ul style="list-style-type: none"> <li>• <a href="https://developer.epa.gov/innovation-fellowship-overview/">https://developer.epa.gov/innovation-fellowship-overview/</a></li> <li>• <a href="mailto:InnovationFellows@epa.gov">InnovationFellows@epa.gov</a></li> </ul>
Managed Print Services	Scope: Fleet assessment, maintenance support services, right-sizing, optimization, break/fix services.	Now	<ul style="list-style-type: none"> <li>• <a href="https://oamintra.epa.gov/StrategicSourcing/Print-Management">https://oamintra.epa.gov/StrategicSourcing/Print-Management</a></li> <li>• <a href="mailto:Gray.RobertA@epa.gov">Gray.RobertA@epa.gov</a></li> </ul>
Microsoft Enterprise License Agreement	Access to all Microsoft products excluding hardware. Average discount of 49% off of GSA Schedule.	Now	<ul style="list-style-type: none"> <li>• <a href="#">ELA details</a></li> <li>• <a href="mailto:Gray.RobertA@epa.gov">Gray.RobertA@epa.gov</a></li> </ul>
National Quality Assurance System	An enterprise quality assurance management system to link the EPA Quality Community together and provide the CIO with real-time status on the state of EPA's quality programs.	FY19 Q1	<ul style="list-style-type: none"> <li>• <a href="mailto:Tallent.Robert@epa.gov">Tallent.Robert@epa.gov</a></li> </ul>
Qlik Sense	Data visualization application. This web-based software application is available for all EPA employees.	Now	<ul style="list-style-type: none"> <li>• <a href="#">Information and log-in</a></li> <li>• <a href="mailto:analytics@epa.gov">analytics@epa.gov</a></li> </ul>
Virtual Desktop Infrastructure (VDI)	WCF subscription service providing 2500 concurrent virtual desktops for Agency use.	Now	<ul style="list-style-type: none"> <li>• <a href="mailto:McMillan.Larry@epa.gov">McMillan.Larry@epa.gov</a></li> </ul>



# eDiscovery and Records and Content Management

## ❖ Records Management

- Capstone: Automating Email Records Management
- Records Management Visioning Effort & Next Steps
- EZ Desktop Records Tool
- FY18 Records Management Training

## ❖ Discovery Services

- Implement the Exterro Litigation Hold Tool (Q2 2018)
- Implement the Exterro Project Management Tool (Q3 2018)
- Upgrade to Relativity v9.5 (Q3 2018)
- Purchase additional Relativity licenses for reviewers (Q3 2018)
- RFI for new Discovery Services Contract (Q2 2018)
- SOW for new Discovery Services Contract (Q3 2018)
- Award new Discovery Services Contract (Q1 2019)
- Detail and hire staff for the eDiscovery Assistance Team (Q3 2018 – Q1 2019)
- Hire an additional Case Manager (Q3 2018)
- Hire a Program/Budget/Contract staff member (Q3 2018)



# Continuous Diagnostics and Mitigation (CDM) Phase I – What's on the Network

CDM Phase I Tools include:

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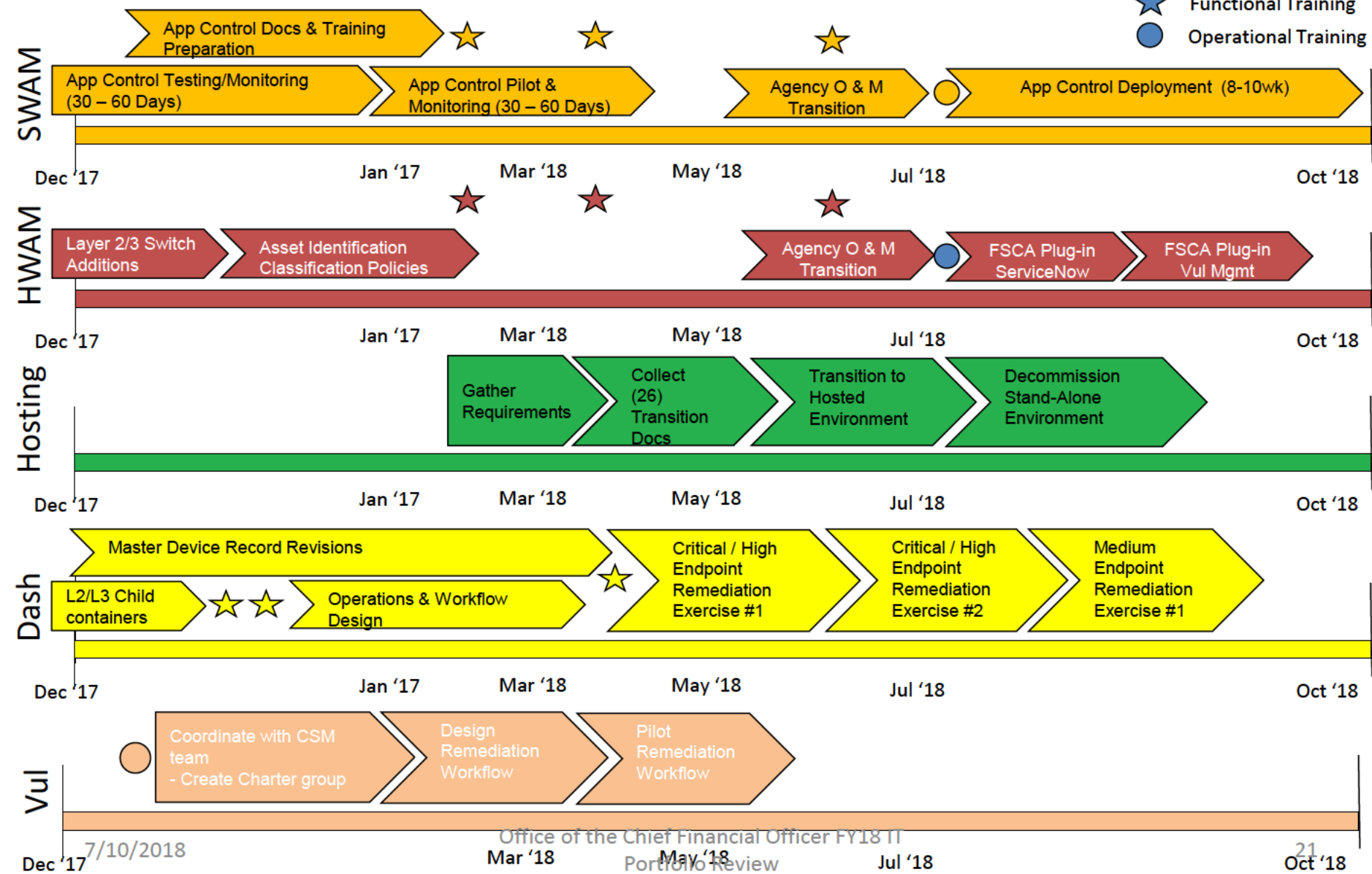
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# CDM Phase I Milestones

- ★ Functional Training
- Operational Training





## Ideas on Shared Services

- Optional: Program Office's ideas, comments, or considerations for EPA IT/IM shared services.



## Other Feedback for OEI



## Application Deployment

<b>Which platforms are you targeting to deploy your newly developed or redeveloped applications?</b>	Payment Tracking Systems we are Upgrading Apex to 5.0, Migrating Oracle Forms & Reports to Apex. <b>BFS:</b> Microsoft Azure Government Cloud Platform as a Service resources. Potentially move to CGI cloud.
<b>If you already have applications or data deployed in the cloud, who are the Cloud Service Providers, and upon what Application Platforms?</b>	CGI PDC Site See Architecture Diagram for Compass <b>BFS:</b> Microsoft Azure Government Cloud. Application platform uses the following Platform as a Service resources: Azure Cloud Services for application and presentation tier and Azure SQL for data tier.



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# OCFO Applications

Category	Sub-category	Item	Value	Unit	Notes
Total	Total	Item 1	100	100	
		Item 2	100	100	
		Item 3	100	100	
		Item 4	100	100	
Category A	Category A	Item 1	100	100	
		Item 2	100	100	
		Item 3	100	100	
		Item 4	100	100	
Category B	Category B	Item 1	100	100	
		Item 2	100	100	
		Item 3	100	100	
		Item 4	100	100	
Category C	Category C	Item 1	100	100	
		Item 2	100	100	
		Item 3	100	100	
		Item 4	100	100	



## OCFO Applications

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## OCFO Applications

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